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HOW WILL FOODSERVICE FACE THE WASTE CRISIS?...38

Job$ II: Survey reveals change in attitudes...62

Taste: Flavor revolution captures the country.....90

Institutions: Marriott at AMEX, alcohol on campus..134

Cover: More ways to make chicken a new dish.....150

AUGUST 19, 1988

A Cahners publication serving the total foodservice industry

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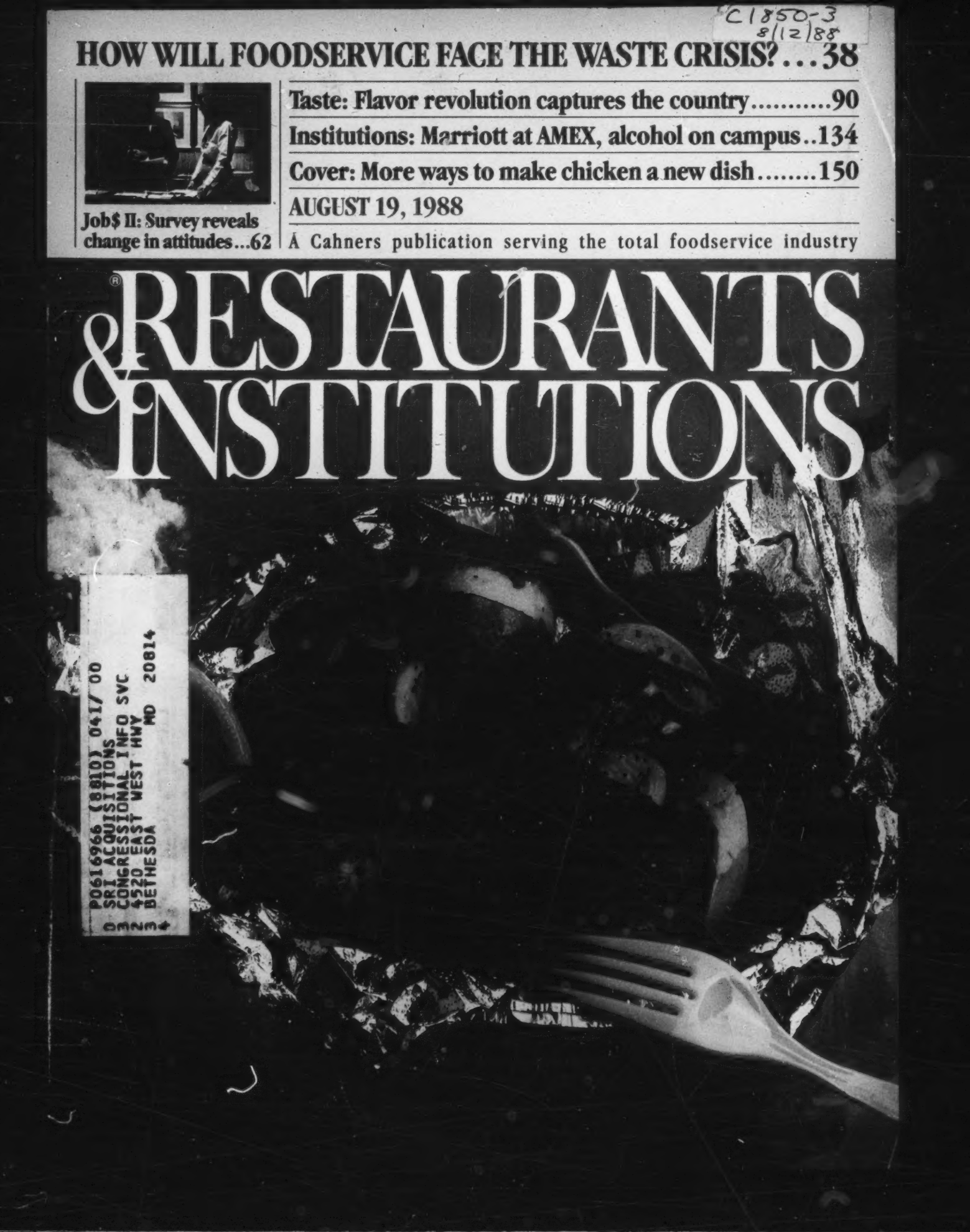

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CONTENTS

Vol. 98 No. 20

BRIEFINGS
A summary for busy readers 5

COMMENTS
Waste management: A growing problem 11
Operations in this issue 11

VIEWPOINT
What business are you in? 14

R&I FORUM
Letters 18

R&I SCENE
People, Places & Promos 20
Personal Glimpse: James A. Nassikas 21

R&I REPORT
Food Costs: Impact of '88 drought 26
Legislation: Disabled people call for equal access 30
City Beat: Opportunities for service industries in Princeton, N.J. 33
Economic Experts: Entrepreneurial activity slows 34

R&I EXCLUSIVE
Operations: The waste crisis 38

JOB$ '88
Annual Job$ Survey: Is foodservice in your future? 62

MENUS
Menu Design: Olga's menu woos first-time customers 81
Menu Promotions: Burger King brings outer space to earth 84

TASTE
Food Trends: Bold new flavors are assertive but not necessarily hot 90

CHAIN DIGEST
Corporate Profile: Steak and salad duel at Bonanza 107
Expansion Strategies: Pizzeria Uno draws first-class franchisees 112
Convenience Stores: Beverages promoted on TV 114
Taking Stock: Rax's midyear report discusses problems and progress 114

INDEPENDENTS
City Beat: Building business through word-of-mouth advertising 118

Regional Food: Nashville's Hap Townes serves meat-and-three 123
Fine Dining: 1000 Wilshire's chef believes in farm-raised seafood 126
Hotline: Independent happenings 129

LIQUID ASSETS*
Bar Design: Holiday Inn gets an "A" on restaurant/lounge renovation 131

INSTITUTIONS
Business & Industry: American Express moves headquarters and employee dining spot 134
Colleges & Universities: Campuses try to combat excessive student drinking 136
Hotline: Goings-on in institutions 138

DESIGN
Design Profile: Cardini in Los Angeles 143

EQUIPMENT
Food Preparation Equipment: Labor-saving devices simplify prep work 146

FOOD
Center of the Plate: The newest chicken dishes 150

MARKETPLACE
Menu Merchandising: Dessert drinks help stir up coffee sales 166
Dessert Coffee Products 170
Product Development: New oils for nutrition-minded operators and patrons 173
Buyers Mart: New products 175

CLASSIFIED ADS
Buying, selling, changing jobs 198

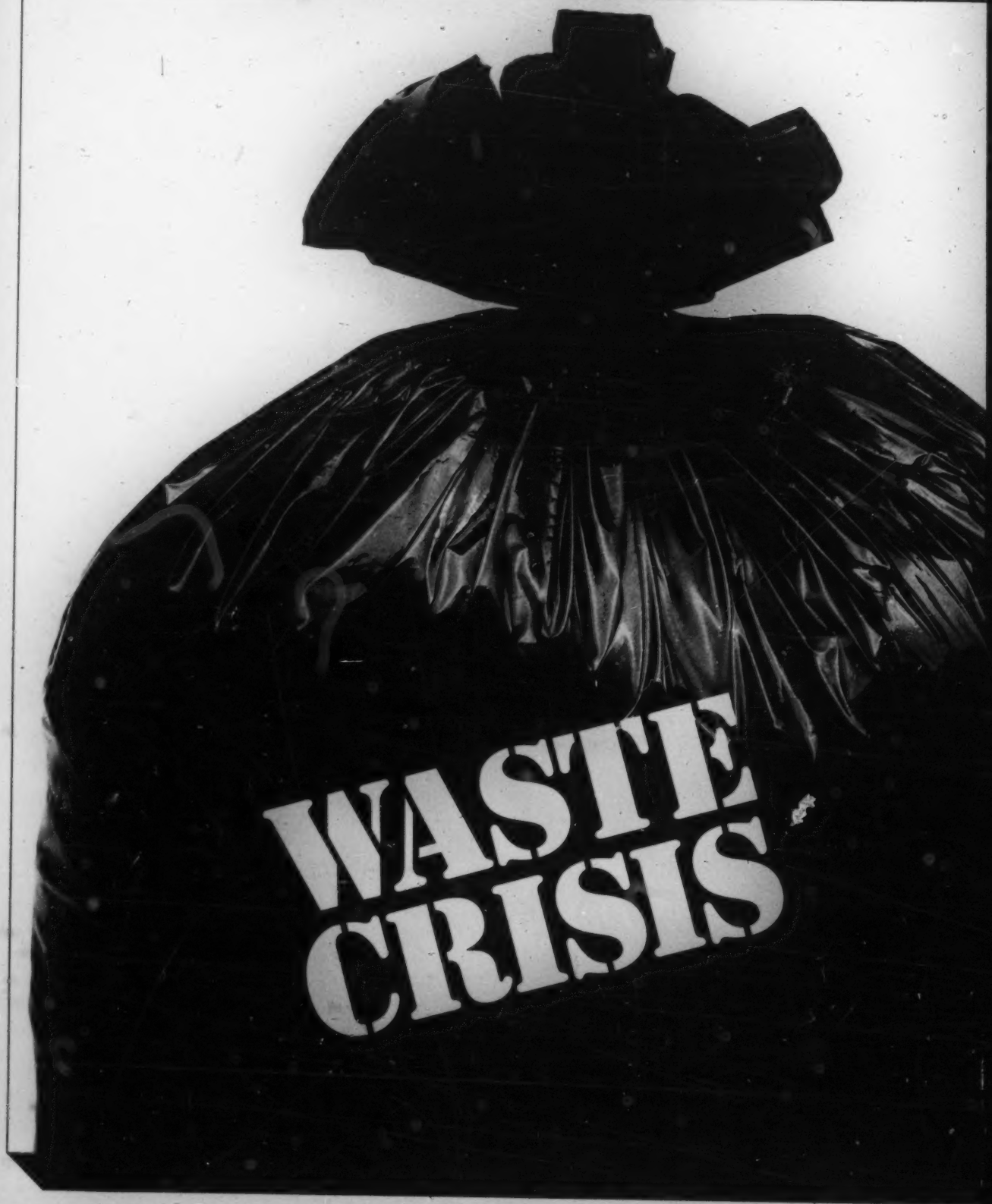
ACTION EXPRESS
For more product information 206

ADVERTISING INDEX
Where to find ads in this issue 206

READER SERVICE CARD
For more information 207

*A special section for commercial operators only.

R&I EXCLUSIVE



RESTAURANTS & INSTITUTIONS

■ INDUSTRY ISSUES

WE CAN'T DUMP THIS ON SOMEBODY ELSE

Industry has a choice: reduce waste and recycle or suffer from skyrocketing disposal costs and restrictive legislation.

By Monica Kass

Constantine's restaurant in East Lyme, Conn., pays $250 a month for garbage disposal—triple last year's fee. The reason: a new, mandatory recycling law that requires East Lyme restaurants to sort their trash into three dumpsters—one for glass and cans, one for paper and cardboard, and one for wet garbage.

"It was kind of a shock at first," says Constantine's owner Andy Pappas. "We had to train the staff to get used to the procedures and had to find space for the dumpsters. But even though it's been an adjustment, it's better to cooperate than deal with the alternative."

The alternative—garbage disposal rates up to $500 a month—would result if East Lyme had to ship garbage elsewhere. "We're extending the life of our landfill," explains East Lyme Recycling Coordinator Dan Miller. "If it were full, we'd have to send all of our trash out of state, and the costs to restaurateurs would be twice as high as they are today."

East Lyme's mandatory recycling law is the prototype for the rest of the state. By 1991, restaurants and businesses in Connecticut's 168 other municipalities will be required to sort trash for recycling. New Jersey, Rhode Island, Philadelphia and several California municipalities are not far behind.

Three years ago, asking restaurants to sort their trash for recycling would have been viewed as extreme. But no longer. America's breezy out-of-sight, out-of-mind attitude about garbage has been knocked flat by statistics that show the amount of landfill space dwindling faster than alternative methods can be implemented. To address this problem, legislators

GARBAGE GLOSSARY

Waste management experts speak their own language. Definitions for a few key phrases used in each of the three waste-disposal methods—landfills, incineration and recycling—follow.

LANDFILLS

NIMBY: **The acronym for Not In My Back Yard, an attitude taken by many communities toward garbage, making the siting of new landfills a political nightmare.**

Groundwater contamination: **This occurs when rainwater percolates through decomposing garbage in landfills, gradually reaching undergound water reservoirs. Groundwater contamination has prompted the closing of many landfills.**

Tipping fees (or gate fees): **The amount of money landfills and waste-to-energy plants charge waste haulers to dump trucks full of garbage.**

INCINERATION

Waste-to-energy plants: **Incinerator plants that burn waste to produce either steam or electricity (mass burn).**

Dioxins: **Among the most toxic molecules known to man, dioxins are produced when materials containing chlorine compounds (some plastics, table salt, bleached paper) are burned. Dioxins weaken the immune system.**

RECYCLING

Cullet: **Post-consumer glass crushed and bought back by the glass industry to be recycled into new containers.**

Putrescibles: **Food and organic waste-contaminated materials (such as used paper plates, wraps and cups) that cannot be recycled.**

WASTE CRISIS

FOODSERVICE WASTE CYCLE

LANDFILL	
1984	90%
2000	25%

RECYCLING CENTER	
1984	6%
2000	25%-35%

INCINERATOR	
1984	4%
2000	40%-50%

The industry's use of packaging with the shortest useful life span keeps it in the hot seat.

are drafting comprehensive waste-reduction and recycling acts that require participation by commercial establishments as well as the residential sector.

Nonetheless, something so sweeping as mandatory recycling for the commercial sector comes as a shock to the foodservice industry. Everyone's attention has been focused on debates over the industry's use of plastic packaging. In 1987, the foodservice industry generated three million tons of trash, only 3% of the nation's solid waste stream. Of that, less than 1% was polystyrene hinged containers. But volume is not the problem. The problem is that highly visible takeout and fast-food packaging has become the symbol of a wasteful society—especially since the containers have such a short useful life span.

In addition, the industry took a lot of heat when it was discovered that the foaming agents (chlorofluorocarbons, or CFCs) used to make some polystyrene foam food containers were linked to the depletion of the ozone layer that protects the earth from cancer-causing ultraviolet radiation.

Legislators, reacting to environmentalist pressure, threatened to ban the material. Responding quickly, the plastics industry moved to replace CFCs with an alternate blowing agent (HCFC-22) for all food packages it manufactures. (The switch will be complete by 1989.) In spite of this action, legislators went ahead with more than two dozen bills on state and local levels aimed at taxing, banning and restricting the use of polystyrene. Before the smoke cleared, Suffolk County, N.Y.,

The foodservice industry, particularly fast-food operations, has come under the scrutiny of legislators who are looking to reduce the nation's waste stream rather than face the politically difficult task of choosing new landfill sites. Currently, 90% of all foodservice garbage ends up in landfills, but the goal is to shift much of that volume to incinerators and recycling centers by the year 2000.

legislators had banned polystyrene and polyvinylchloride plastic wraps from use in foodservice establishments, effective July 1989.

As unfair as it may seem, the foodservice industry must realize that there is no escaping the spotlight in the wake of the CFC disaster. Initial legislation aimed at the industry because of CFCs has been broadened and expanded to tackle the plastics disposability problem and finally, the overriding problem, "What to do with all the trash?"

This progression of issues—from CFCs to plastics to comprehensive waste management—is well-illustrated in cities such as Los Angeles, where legislators started with a ban on the purchase of polystyrene food containers in city departments and now are moving to more comprehensive waste-reduction rulings. Says John Stodder, environmental affairs advisor to Los Angeles' mayor, "Initially, the foodservice industry's use of packaging with CFCs brought everything to a head. But the issue really became compelling to us as a whole package, with waste minimization as the larger and really separate issue."

Stodder's words are echoed by Patrick Kelch, assistant director of public works for environmental and community affairs in Berkeley, Calif.: "This issue is not yet resolved. So much emphasis has been put on the ban of plastic material . . . we feel that the focus should be more on encouraging efficient use of packaging."

Kelch adds that while Berkeley wants to maintain its tough stance on plastics, it "wants to be more comprehensive and reasonable with proposed waste-reduction measures."

Ultimately, what government officials such as Kelch and Stodder dream of is to redirect much of the garbage that ends up in landfills. Right now, 90% ends up in landfills, 4% is burned in incinerators and 6% is recycled. The goal is to recycle at least 25%.

Connecticut's mandatory recycling act (Public Act 87-544) stipulates that no recyclable materials—including glass, metal and cardboard boxes—will be allowed in any Connecticut landfill or waste incineration plant after Jan. 1, 1991.

In addition to Connecticut, three other states have some sort of mandatory recycling laws in place. Five more states—Wisconsin, Minnesota, Illinois, Pennsylvania and New York—are among those in which experts expect such laws will be enacted shortly. Because most states are still wrestling with the logistics of residential recycling programs, the foodservice industry has yet to feel the full impact of these laws. Once the kinks are worked out of residential programs, commercial programs will be established.

Philadelphia may be one of the first large cities to get the commercial half of its recycling program off the ground. Al Dezzi, Philadelphia's recycling coordinator, is setting it up. Dezzi explains, "In Philadelphia, an ordinance passed in June 1987 calls for mandatory recycling. Not just the household waste stream, but the entire waste stream—foodservice establishments included. The 'how' of that is

continued on page 44

DO A WASTE AUDIT

What's in your dumpster? If you don't know, you are probably throwing away valuable, recyclable materials and the chance to negotiate with your hauler for lower disposal fees. A waste audit will help you turn trash into cash.

☑ **What types of waste does your operation produce?**

☑ **Is there an excess of insulating material (wraps to keep the food hot)? If so, you may be overpackaging your food products. Cutting back on packaging means less money spent on garbage disposal.**

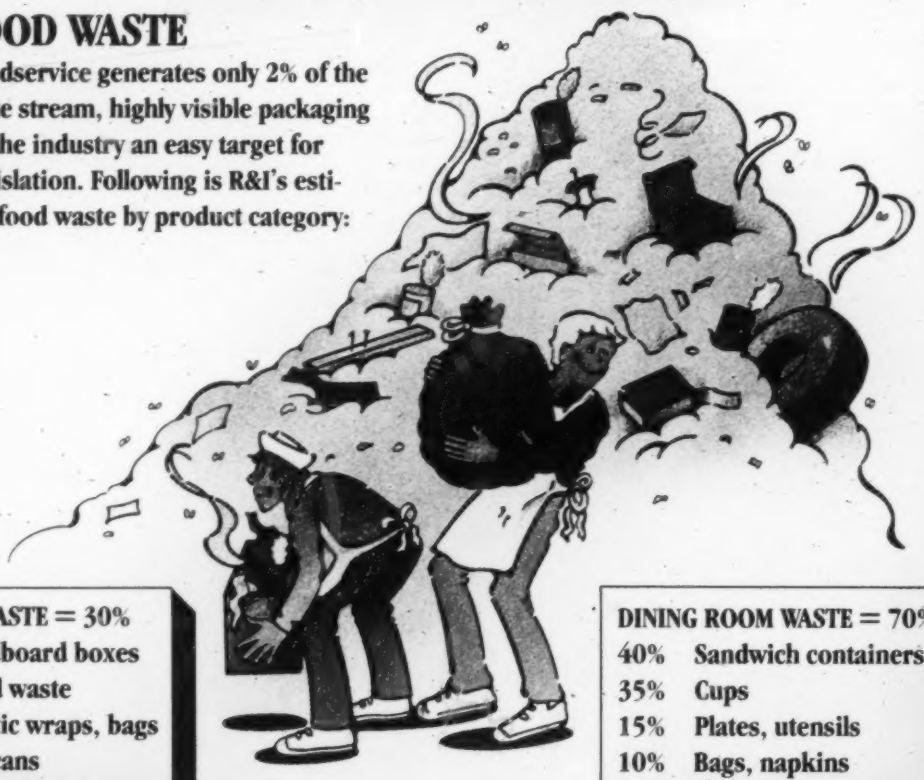
☑ **Are there large quantities of cardboard, glass bottles, food or beverage containers in the bin? Materials suppliers and independent recyclers pay to reclaim all of these materials.**

☑ **Check your Yellow Pages to find recycling companies. Some entrepreneurial firms will drive to get materials. Recycling the trash may allow you to contract with your hauler for less service at cheaper rates. In other areas, haulers are getting into the recycling business. If you've done your homework and know what your trash is worth, your hauler may be willing to lower disposal fees in return for the money he gets for your recyclables.**

WASTE CRISIS

FAST-FOOD WASTE

Although foodservice generates only 2% of the nation's waste stream, highly visible packaging logos make the industry an easy target for recycling legislation. Following is R&I's estimate of fast-food waste by product category:



KITCHEN WASTE = 30%

50%	Cardboard boxes
25%	Food waste
15%	Plastic wraps, bags
5%	Tin cans
5%	Miscellaneous

DINING ROOM WASTE = 70%

40%	Sandwich containers
35%	Cups
15%	Plates, utensils
10%	Bags, napkins

Waste legislation aimed at the industry started with CFC bans and has progressed to mandatory recycling.

continued from page 41

being worked out right now. One of the things that has been proposed is that we ask commercial establishments to separate wet garbage from dry trash. From there, we'd also like them to separate recyclables from the dry trash." Dezzi further explains that sorting could be done right on site or a hauler could be paid to pick up dry trash and put it through a processing plant where recyclables would be pulled out.

The "how" that Dezzi is working on, foodservice establishments are beginning to tackle voluntarily, with the aid of materials suppliers who stand to benefit from the flow of recyclable waste.

In tandem with California's recent passage of the California Beverage Container Recycling and Litter Reduction Act, the glass industry formed the California Glass Recycling Corp. The organization's purpose is to help the state reach a goal of redeeming 65% of all glass, aluminum, plastic and bimetal beverage containers by Dec. 31, 1989. To capture the large percentage of glass used by the foodservice industry, CGRC established a cash-back hotel, bar and restaurant glass-recycling program called The Phoenix Project.

Launched in Anaheim, Calif., in March 1987, the project has hundreds of participants in Orange, Los Angeles, San Diego and Santa Clara counties. Partipants sort their glass according to color and are paid up to $20 a ton. The project's first participant—the Disneyland Hotel—generates 20 tons of glass each month.

J. Rodney Edwards, vice president of the paperboard division of the Ameri-

can Paper Institute, says he is working with a 5,000-unit fast-food chain to develop a system where the fleet of trucks that delivers supplies to the units would pick up corrugated boxes for the return trip. These would then go to waste-paper dealers. Although Edwards expects it will be two years before the pilot program is completely unfolded, if it works, the program shows potential for implementation nationwide.

Similar programs at supermarket chains are saving participants significant sums of money in avoided disposal costs. According to Edwards, one Northeast supermarket chain with 110 participating stores generates 250 tons of corrugated containers a week. These are either hauled back to warehouses or sold directly to dealers. Keeping the boxes out of the landfills helps the chain avoid $2 million in disposal fees a year.

Independent of API, McDonald's is also in the beginning stages of a pilot paper-recycling program that will work in a similar fashion. The test will involve 175 McDonald's restaurants in Upstate New York. "All of McDonald's supplies come in corrugated boxes," says McDonald's general counsel Shelby Yastrow. "We're testing ways to collect the boxes, bale and recycle them." Some of the units will bale the boxes on site; others will store the boxes to be picked up for baling at a central facility. If McDonald's can show that it is economically feasible and operationally efficient to recycle the boxes, the company will expand the program.

Smaller in scope, but just as dramatic is a second pilot program McDonald's has launched in conjunction with a major supplier to recycle foam food containers from 20 McDonald's restaurants in New York City and Long Island. McDonald's personnel will accumulate trash at each site for transfer to a central warehouse where foam containers will be separated from paper trash. The foam will be washed, chopped and shipped back to the supplier where it will be made into pellets and re-extruded into insulation board for use in houses. There is a possibility that the paper also may be recycled for use as compost.

Yastrow, who heads an environmental task force at McDonald's, unveiled both recycling plans in a meeting with

continued on page 50

OPERATORS COMMENT ON RECYCLING

Have you thought about recycling?

"We really haven't done much. I was approached by a representative from Goodwill not too long ago who was interested in picking up our aluminum cans. I approached a couple of the student organizations to see if I could get them interested, but got no response. It will become a problem. The cost for hauling has tripled in the past 12 months." *Frank Gladu, director of dining services, Vanderbilt University, Nashville, Tenn.*

"We love recycling. We've always loved recycling. We've been baling our corrugated boxes and selling them back to the recycling center. The initial investment in the machine was costly, but we save money in the long run by lower disposal costs." *Jeanie Goldhahn, Yesterday's, Fort Lauderdale, Fla.*

"We are reselling our grease, and we separate all of our glass and tin cans from the garbage and sell those. The recycling center in town comes and picks the recyclables up. It saves us a few hundred dollars a month in disposal costs." *Joe Brown, Old San Francisco Steakhouse, Dallas*

What would keep you from wanting to recycle?

"Part of the essence of our business is standard procedure. There is still no national policy on recycling. We would have difficulty trying to deal with something on a town-by-town basis, especially as it relates to packaging or waste handling or any other operational consideration. In addition, there's the question of storage of the material between pickups. We don't like to keep materials contaminated with food residues on the premises because of the sanitation threat." *Chet England, group director, quality assurance, Burger King*

For those who are not yet recycling, what benefits do you think you would enjoy if you were to participate?

"We'd be better citizens. We also might be able to cut back on disposal costs. It may be a cheaper way to get rid of the trash." *Shelby Yastrow, legal counsel, McDonald's*

"I don't see the benefits. In all honesty, we want to make sure everybody else is in the same boat we are with this before we do anything. While we all want to comply with a law, nobody wants to give away a competitive advantage or conversely, become part of a competitive disadvantage." *Chet England, group director, quality assurance, Burger King*

For users of single-use disposable food containers, what about reducing the amount of packaging you use or switching materials?

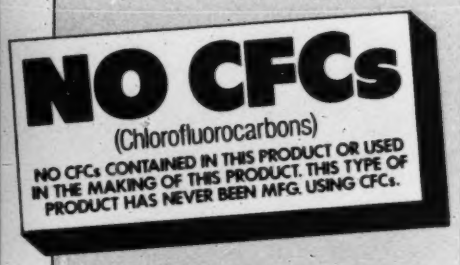
"Switching to paper from plastic or plastic to paper is not the answer. The point is that we have to eliminate what goes into the landfill. I believe recycling will help do that." *Shelby Yastrow, legal counsel, McDonald's*

"If we served on plastic plates and washed them every night and served the product naked, that would reduce waste, but we wouldn't be a fast-food restaurant any more. Portability, quickness, low cost—those are what make fast food unique. When you eliminate any combination of those qualities, you're out of the business." *John Merritt, vice president of legal affairs, Hardee's*

"I experimented in my store. I put both the foam and the paper hot cup with a handle on my carryout counter and let people select which they wanted. Nine out of 10 people elected to take the foam product." *Frank Kalmar, Lox, Stock and Bagel, Berkeley, Calif.*

Frank Kalmar, Lox, Stock and Bagel

WASTE CRISIS


NO CFCs
(Chlorofluorocarbons)
NO CFCs CONTAINED IN THIS PRODUCT OR USED IN THE MAKING OF THIS PRODUCT. THIS TYPE OF PRODUCT HAS NEVER BEEN MFG. USING CFCs.

The Foodservice & Packaging Institute met with key environmental groups in April to announce that food container manufacturers will stop using all chlorofluorocarbons (CFCs) by the end of 1988. Chlorofluorocarbons, non-toxic gases used commonly to cool refrigerators, propel aerosols and "puff" foam food containers, were linked in 1974 to the depletion of the ozone layer that protects the earth from cancer-causing ultraviolet radiation. The Institute's announcement far exceeds government expectations of a 50% cut in CFC usage by the year 2000.

Contrary to popular opinion, foam food containers can be recycled.

continued from page 45

New York Gov. Mario Cuomo June 9. While New York will not fund the project, the state is supporting McDonald's efforts and will work in tandem with the company on a public information campaign (printed on McDonald's tray liners) that will alert customers as to how they can help to reduce waste.

Yastrow says he hopes recycling will save McDonald's a significant amount in avoided disposal costs, just as it did for the supermarket chain that Edwards cited.

Darlene Snow, waste-recycling programs manager at the National Solid Wastes Management Association, says Yastrow's idea is generally sound, but cautions, "There are a lot of factors that determine whether or not you're going to get a rebate from your hauler." According to Snow, hundreds of wastehaulers are getting into the recycling business.

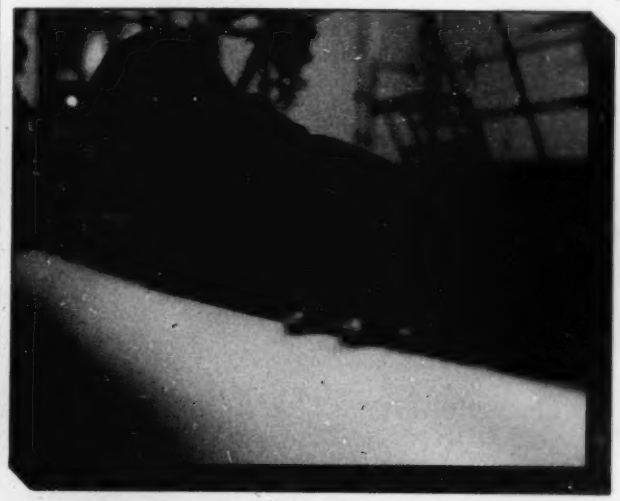
She suggests restaurants do some homework to find out how they might benefit. First, operators should determine what kinds—and what volume—of recyclable commodities can be separated out of their trash. Paper, glass, aluminum and plastic all have different recycling values. Second, she suggests they find out who in the area will buy recyclable materials and what must be done to get them to the recycling center. If recycling centers are far away, it may cost to get the material there. Tallying up the answers will tell an operator how much he would earn if he recycled the waste himself.

Once that is done, says Snow, "The operator has a negotiating tool. He can approach his refuse hauler and say 'Look, if I recycle by myself, I'll get this much back from the recycling center. In addition, I believe by recycling this volume I can cut back my service to three times a week instead of four.'" If an operator shows that he knows the worth of his trash, Snow says, "The refuse hauler is more likely to give him a rebate for his recyclables."

If recycling through a waste hauler is not possible, restaurants can collect their recyclables and sell directly to local dealers at recycling centers or participate in programs where dealers pick recyclables up.

The best way to find out about recycling dealers on a local basis is to check the Yellow Pages under recycling and waste paper headings. Chains researching recycling on a state-by-state basis can write to the National Recycling Coalition, Box 80729, Lincoln, Neb. 68501, for a list of the 25 states that have recycling associations that track recycling centers in their respective states.

continued on page 57



McDonald's is recycling foam food containers into insulation board for use in commercial construction.

WASTE CRISIS

Restaurants in most major cities will be required to recycle in the next five years.

continued from page 50

Of course, recycling would not be possible if markets for the materials did not exist. Currently, markets for paper and aluminum are strongest, followed by glass and, lagging far behind, plastic. Helping things along, several states —Illinois, New Jersey, Pennsylvania, Michigan, Oregon, North Carolina and Wisconsin—are giving away tax credits, grants and loans to firms interested in getting into the recycling business.

Ed Carreras, a principal engineer with Philadelphia-based Day and Zimmerman, one of the largest privately held engineering firms in the country, says his company is planning to take advantage of the credits by building a plastics recycling facility in the New Jersey area. "We're zeroing in on polyester soft drink bottles and polyethylene milk bottles, but we'll be able to take mixed plastics in and process those as well," says Carreras.

Carreras is optimistic about markets for recycled plastics. "There are plenty of markets for recycled plastics because plastic is an engineering material. Depending on how far you process it, you can make pallets, strapping materials or even some high-quality automobile parts from recycled plastics."

Asked about the potential of recycling expanded polystyrene containers as one manufacturer is doing for McDonald's, Carreras responds, "Polyester, polethylene and polypropylene are more valuable materials, but in the near future I would say EPS will definitely be worthwhile to process."

While recycling, with all of its challenges, is the popular focus of legislators today, incineration is still considered a necessary part of the garbage-crisis solution. Seventy-four waste-to-energy plants are now in operation; another 34 are in construction, with additional systems in the planning stages. Most waste management experts look at incinerators as the step following recycling in the waste-handling chain: What cannot be recycled should be burned, energy from the burning waste captured and "recycled." Landfills would thus be reserved solely for incinerator ash.

Whether this progression—reduce the amount of waste generated, recycle, burn and, finally, bury—shapes up to be the best answer to the garbage crisis remains to be seen. The restaurant industry has ample reason to lead the way toward a responsible waste-disposal policy: to preserve a good public image, to keep costs under control and to head off the threat of government regulation. Far better to help structure the solution than to be condemned as part of the problem. R&I

Hundreds of restaurants, bars and hotels are recycling glass as part of the California Glass Recycling Corp.'s Phoenix Project.

WASTE LEGISLATION AFFECTING THE FOODSERVICE INDUSTRY

The following list charts the passage of key waste-related legislation into law. Nearly 200 more waste-related bills are pending before state legislatures.

April 20, 1987: **New Jersey mandates separation and recycling of solid waste to reduce the state's solid waste stream 25% by 1991.**

July 2, 1987: **Connecticut mandates separation and recycling of solid waste to reach a goal of 25% reduction of the annual tonnage of the state's waste by 1991.**

Oct. 1, 1987: **California Beverage Container Recycling and Litter Reduction Act goes into effect, establishing a 1 cent deposit and goal of redeeming 65% of all beverage containers by 1990.**

April 29, 1988: **Suffolk County, N.Y., bans the use of polyvinyl chloride food wraps and polystyrene packaging in restaurants, bars, delis, grocery stores and other retail food establishments effective July 1989.**

June 15, 1988: **Berkeley, Calif., City Council tentatively approves two ordinances restricting the use of plastic food containers. One bans foam containers made with CFCs. The other, to take effect in 1990, bans Styrofoam altogether.**

JOB$ '88

■ ANNUAL JOB$ SURVEY

IS FOODSERVICE IN YOUR FUTURE?

Fast-track advancement, a chance to serve and meet people, exposure to good food and pleasant surroundings, flexible hours, entrepreneurial opportunities: These are some of the rewards of a career in foodservice.

The drawbacks: long hours, unending physical demands, periods of high stress, unreasonable customers, little recognition, low pay, government mandates, growing competition and a future fraught with risk.

Do the rewards of a career in foodservice outweigh the drawbacks? The attitudes expressed by 2,200 respondents to *R&I*'s 10th Annual JOB$ Survey send out mixed signals. A majority of managers and executives are happy in their work, but remain unsure about their future in foodservice. In Part II of the JOB$ survey analysis, *R&I* takes a look at what makes today's executives happy in their jobs and what they expect from their employers. These factors could make the difference between tomorrow's success stories and failures.

Into the future: The foodservice industry is driven by proud and ambitious business leaders. JOB$ survey results show nearly 58% consider foodservice a prestigious career, 42% say it offers better opportunities for advancement than other industries, and almost 65% say they are challenged by their job.

On the other hand, less than 30% say foodservice pays well. Only 31% feel their organization has laid out a clear career path for them, and only 33% do not worry about job security. These attitudes account for the growing number of executives who see themselves working in a different industry within five years. The percentage of those who anticipate changing careers within five years is 11.7%, up from just over

☐ *Foodservice executives find their work satisfying, but remain unsure about their future.*

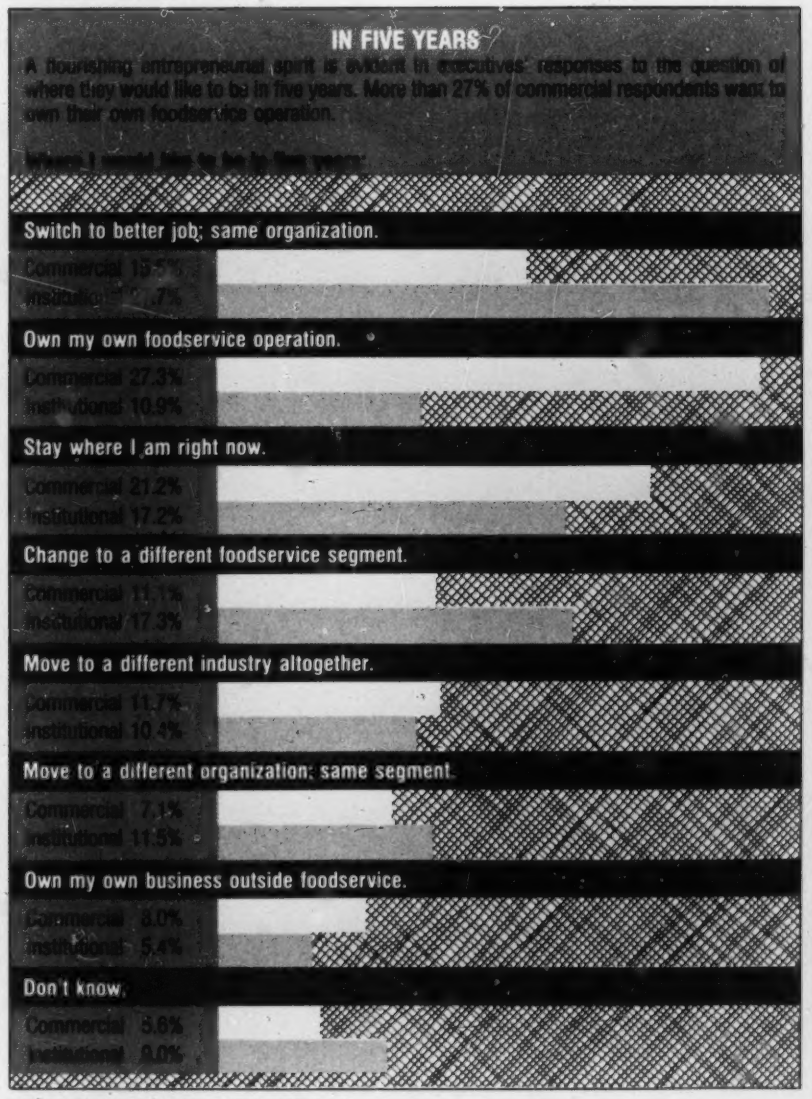
9% in 1987.

Young people are especially impatient with the status quo. The survey indicates that the industry must continue to work hard at promoting foodservice as a career to its young leaders; 14% of those age 25 or younger say they want to change careers, up from 9.2% a year ago. Also, more than 20% of company presidents say they want out of foodservice within five years, compared to 8.7% of vice presidents.

When asked where they want to be in five years, the leading response by foodservice executives is "in a better job within my current organization." But at the same time, the percentage giving this response dipped from 25% in 1987 to 21.8% this year. A weakening of company loyalty is even more apparent in commercial segments, where 17.5% express interest in moving up the ladder from within, compared to 23.2% a year ago. Also, in 1987, 46.9% of regional managers said they wanted a better job within their organization. That percentage dipped to 31.8% this year.

Despite all the headaches and hassles of running the show, owning a foodservice operation is the aspiration of 20.4% (27.3% of commercial respondents vs. 10.9% institutional), up from 18.9% in 1987. Food and beverage directors (37.1%), executive chefs (34.8%) and unit managers (32.4%) report the greatest interest in venturing out on their own.

At the same time, the number of respondents who hope to own a business outside the foodservice industry also increased, from 5.7% in 1987 to 6.9% in 1988. More than 10% from the fast-food segment want to own a business outside foodservice.


IN FIVE YEARS
A flourishing entrepreneurial spirit is evident in executives' responses to the question of where they would like to be in five years. More than 27% of commercial respondents want to own their own foodservice operation.
Switch to better job; same organization.
Commercial 19.5%
Institutional 17.7%
Own my own foodservice operation.
Commercial 27.3%
Institutional 10.9%
Stay where I am right now.
Commercial 21.2%
Institutional 17.2%
Change to a different foodservice segment.
Commercial 11.1%
Institutional 17.3%
Move to a different industry altogether.
Commercial 11.7%
Institutional 10.4%
Move to a different organization; same segment.
Commercial 7.1%
Institutional 11.5%
Own my own business outside foodservice.
Commercial 8.0%
Institutional 5.4%
Don't know.
Commercial 8.6%
Institutional 9.0%

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JOB$ '88

Despite the headaches of ownership, more execs aspire to run their own show.

Working in another segment of the industry within five years is on the mind of 13.7%, up from 11.8% a year ago. More than 17% on the institutional side plan to make the switch, including 22.8% of assistant food and beverage directors and 18.2% of dietitians.

Survey results also reveal that one in five respondents has no plans to change jobs within the next five years.

Rising to the occasion: Survey results reveal that the most challenging work can be found in the hotel/motel segment. More than three-quarters of lodging respondents say their work is challenging, 21.4% say it is routine and 2.6% are just plain bored. Not surprising are results that show 44% of fast-food management staffs find their jobs routine, while 54.7% say their work is challenging.

By position, assistant unit managers are the least challenged; 11.4% are bored and 52% refer to their job as routine. Most challenged are vice presidents (85.6%) and food and beverage directors (74%).

The survey also reveals that challenge increases with age. Only 55.5% of those under age 25 say they are challenged, compared to 71.4% of those aged 56 to 65.

Current attitudes: People outside the industry usually do not associate foodservice with prestige. Comedians are always poking fun at fast-food restaurants. Customers love to needle and criticize celebrity chefs and arrogant owners. But on the inside, 58% (62.5% commercial vs. 51.3% institutional) of JOB$ survey respondents feel a career in foodservice is prestigious. Even in the often maligned fast-food segment, 54% believe they are working in an honorable field. More than 72% of executives from private clubs feel pride in their occupation. This sense of pride does not run nearly as high on the institutional side. Only 47.3% of employee-dining executives say foodservice is a prestigious career, while 65% of military and correctional facility managers feel important in their job.

The prestige factor also correlates to age. Esteem runs high (63.7%) for those under age 25, decreases to 53.5% for those aged 26 to 35 and then steadily increases to 70% for respondents aged 56 to 65 and 86% for those over age 65.

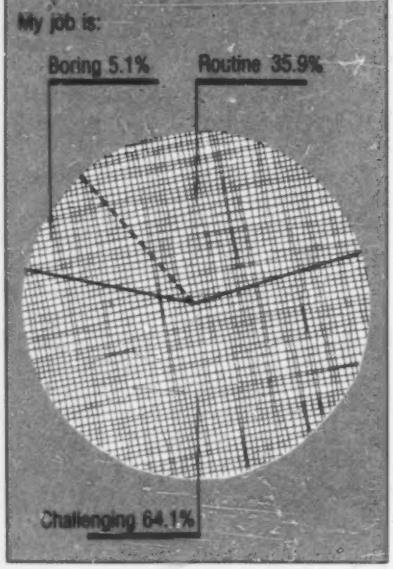
Many business executives feel that company loyalty is an outmoded idea. Not so in the foodservice industry. Old-fashioned values prevail, with 71.3% disagreeing with the idea that loyalty is outmoded. Survey results indicate loyalty is the strongest in the West and weakest in the Northeast.

Job security is top of mind with just about everyone, especially those in foodservice, as 61.6% disagree with the statement: "I don't have to worry about job security." Hotel/motel and employee-dining executives express the most concern, while respondents who work for fine-dining restaurants feel the most secure in their positions. Job security is a concern of 59% in the

continued on page 72

NEVER A DULL MOMENT?

Job challenges exist for those in the fine-dining, lodging and school segments, but the routine has soured for fast-food and health-care execs.



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INDUSTRY ATTITUDES REMAIN POSITIVE

Pride in the foodservice industry and the desire to pursue a foodservice career are still prevalent attitudes but they could be in jeopardy. The drawbacks of the industry may begin to outweigh the rewards unless foodservice leaders do more to provide increased job security, better pay and a more clear-cut career path.

	Agree	Disagree	No opinion
Foodservice is a prestigious career.	57.8%	31.9%	10.3%
I don't have to worry about job security in the foodservice industry.	33.5	61.6	4.9
Foodservice pays well.	29.7	62.1	8.2
Foodservice offers me better opportunities for advancement.	41.6	39.8	18.6
My job does not make the best use of my talents.	42.9	50.4	6.6
My organization lives up to employee commitments.	61.5	28.7	9.8
My organization has a clear career path laid out for me.	31.0	51.7	17.3

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JOB$ '88

Old-fashioned ideas about company loyalty still prevail among foodservice executives.

continued from page 64

labor-strapped Northeast, compared to 65.2% in the West.

The foodservice industry's reputation for low pay is well-deserved. When asked if foodservice pays well, only 29.7% agree. Almost 35% from the South feel well-compensated, vs. 25.7% in the West. Thirty-four percent of male respondents are happy with their salary, compared to 22% of females.

No matter how much anyone earns in salary, is it ever enough? Apparently not, because one-third of the respondents are supplementing their income. Fully 40.5% of owners and 42.4% of company presidents supplement their income. Only 27.5% of unit managers and 26.4% of assistant unit managers report supplemental income, probably because their full-time jobs absorb too much energy.

For 49% of the respondents, supplemental income accounts for less than 10% of their total income. But for 24.2%, secondary sources account for more than 25% of their total income.

Almost 39% report the second source comes from a business they own. For about a third of those, that business is foodservice-related. More women report joining the entrepreneurial ranks this year, as 36.5% say their additional income comes from their own business, compared to 29% a year ago.

Consulting and catering are growing in popularity as opportunities for moonlighting. Almost 40% of dietitians say they consult part-time, as do 30% of vice presidents. More than 30% of executive chefs, and food and beverage directors moonlight as caterers. Catering has been especially lucrative for respondents from the Northeast.

Certainly one of the advantages of a career in foodservice is opportunity. There never seems to be a shortage of available positions. Almost 42% (49% commercial vs. 31.5% institutional) agree that foodservice offers better opportunities for advancement than other industries. Respondents from the hotel/motel segment (63.3%) are the most optimistic, while only 27% of health-care managers have a positive outlook about foodservice opportunities. More than 70% of institutional respondents say they would not mind finding work in another segment of the industry.

Getting ahead: Money and responsibility continue to score the highest as reasons foodservice executives take a new job. This year, 40% say they switched jobs for responsibility and advancement, while 16.5% mentioned money. In each of these categories, the institutional percentage is higher than the commercial. Other leading reasons for leaving a job include relocation (6.3%), lay off or firing (4.8%), company closing (4.5%) and starting a business (3.2%). Less than 1% left to start a family or because of stress and pressure. Among college and school foodservice executives, neary 7% left for better hours.

On the home front: The growing pressures of a career in foodservice continue to take their toll on executives' private lives. Last year, only 30% said their career was having a negative effect on relationships. But in 1988, the percentage jumped to 36% (44% commercial vs. 24% institutional). Those who say their job is having a positive effect on their relationship decreased

continued on page 76

FOR LOVE OF MONEY

When asked why they left their last foodservice job, money was cited as the primary reason by 16%. Here is a breakdown by job:

Executive chef	28.9%
Food & beverage director	20.8
Unit manager	20.5
Foodservice director	19.1
Assistant unit manager	17.3
Dietitian	14.6
Vice president	12.7
Regional manager	12.0
Corporate staff	11.9
President	7.8

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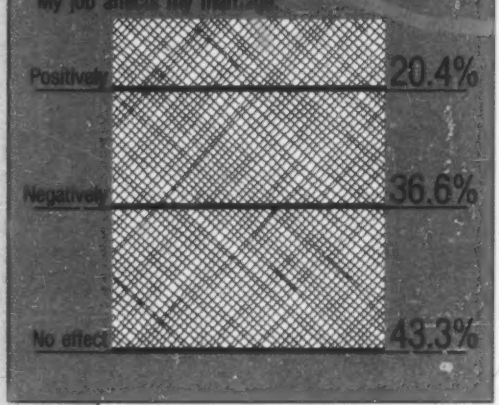
RAT RACE

Survey results indicate that a career in foodservice is having more of an adverse effect on marriages this year than in the past, particularly among assistant unit managers and executive chefs.

My job affects my marriage:



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JOB$ '88

More than 40% say their career is having an adverse effect on their marriage.

DISCRIMINATION CLAIMS DECREASE

The percentage of managers and executives who say they have been discriminated against declined this year. Among the leading commercial segments, fine dining and hotel/motel report the most claims. The number of women reporting sex discrimination increased from 78.9% to 81.8% this year.

	Fine dining	Mid-scale	Fast food	Hotel/ motel	Industry average
Race or ethnic	16.2%	10.1%	15.9%	19.6%	13.4%
Religion	8.1	6.1	6.3	6.5	6.0
Age	70.3	55.6	55.6	65.2	53.0
Sex	35.1	42.4	34.9	28.3	46.8

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from 26.8% in 1987 to 20.4% in 1988.

Owners, unit managers, assistant unit managers and executive chefs are having the most trouble juggling their jobs and private lives, while company presidents and dietitians are having the most success. It should also be noted that 43.3% say their job has no effect on relationships.

Striding toward equality: Slowly but surely, the foodservice industry appears to be making headway toward reducing discrimination claims. This year, the percentage of racial or ethnic, religion, age and sexual discrimination claims all decreased slightly for the fifth straight year. Perhaps the main reason behind this trend is the number of internal protests being lodged, which increased dramatically from 5% a year ago to 30% this year. While 289 respondents say they did nothing this year in reaction to perceived discrimination, 200 protested. Also, 183 left the company and 21 filed a complaint with the Equal Employment Opportunity Commission.

—Jeff Weinstein

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ADVERTISING INDEX

For more information on the products advertised and featured in this issue, circle the number indicated on the Reader Service Card.

Advertiser	Inquiry No.
ALCO Foodservice Equipment Co., Dean Industries (p.144-145)	56
Adolph Coors Co. (p.130)	48
American Gas/Keating (p.177)	66
American Gas/Vulcan Hart (p.49)	19
American Home Foods (p.193)	77
Amoco Foam Products Company (p.46-47)	17
Atkins Technical, Inc. (p.192)	76
Atlantic Cheinco Corp. Co. (p.195)	83
Avoco (p.181)	68
B.K. Industries (p.190)	74
Basic American Foods (p.92-93)	32
Bil Mar Foods, Inc. (p.159)	58
Browning Ferris Industries (p.56)	16
Bryan Foods (p.102-D-102-E)	95
Buffalo China Inc. (p.185)	64
Bunge Edible Oil Corp. (p.19)	7
CPL Industries, Inc. (p.179)	67
California Avocado Commission (p.127,128)	47
Carnation Co., Foodservice (p.116-117)	43
Cas[illegible]ayne Co., Inc. (p.196)	84
Cla[illegible]d Advertising (p.198-204)	
Col[illegible] Inc., Frozen Yogurt (p.13[illegible])	54
Contin[illegible]tal Coffee Products (p.IBC)	92
Country Crock/Shedd's Food Products, Inc. (p.115)	42
Cryovac Div., W.R. Grace & Co. (p.141)	55
Culligan U.S.A. (p.191)	128
Custom Foods (p.82-83)	28
Dean Industries, Div. of ALCO Foodservice Equipment Co. (p.144-145)	56
Delta Pride Catfish (p.187)	71
Dixie Crystals/Savannah Food &Industries, Inc. (p.32)	10
The Drackett Products Co. (p.73)	23
Durkee-French Foods, Inc. (p.174)	65
Electric Eel Mfg. Co., Inc. (p.194)	78
Equal Low Calorie Sweetner (p.74-75,77)	24,26
Fishery Products, Inc. (p.88-89)	31
Fort Howard Corporation (p.65-67,68-69,70-71)	20,21,22
General Foods, Open Pit (p.78-79)	27
Georgia Pacific (p.96-97)	33
Gold Medal Products, Co. (p.196)	87
Heinz Co., H. J. (p.16-17)	6
Holly Farms Foods, Inc. (p.164-165)	62
Honey Hill Farms (p.113)	41
Hunt-Wesson Foodservice Div. (p.7-10)	4
Hussmann Foodservice Co. (p.197)	112
Iceland Seafood Corp. (p.51-54)	14
International Cold Storage Co., Inc. (p.188)	72
John Morrell (p.183)	69
Katchall Industries, Inc. (p.195)	80
Keating of Chicago, Inc./ American Gas (p.177)	66
Kikkoman Int'l. Inc., (p.110-111)	40
Kronos-Central Prods., Inc. (p.140)	121
LaVictoria (p.163)	60
Lancaster Colony Commercial Products (p.197)	90
Land O Lakes, Inc. (p.IFC)	1
Lanikai Int'l. Ltd. (p.133)	49
Lawry's Foods, Inc., Food Service Div. (p.148-149)	57
Libbey Glass Foodservice, Libbey Glass Div. (p.31)	9
Lincoln Foodservice Products, Inc. (p.169)	63
Manchester Farms (p.76)	25
Merico, Inc. (p.3)	2
Milliken Visa (p.122)	45
Minor Corp., L.J. (p.15)	
Molded Fiber Glass Tray Co. (p.197)	88

continued on page 205

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